

# Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:  
RECEIVED  
SECRETARY OF THE SENATE  
PUBLIC RECORDS

**Post-Travel Filing Instructions:** Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

2020 MAR 17 PM 5:53

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**  
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): Information Technology and Innovation Foundation (ITIF)

Travel date(s): February 20 - February 23, 2020

Name of accompanying family member (if any): \_\_\_\_\_

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

## Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$1228.53 Airfare = \$980 Shuttles = \$150 Rideshare = \$98.53	\$825	\$435	
<input checked="" type="checkbox"/> Actual Amount		\$275 per night		

## Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.):

Please see attached traveler schedule.

3/6/20

(Date)

Kurt Lynch

(Printed name of traveler)

(Signature of traveler)

## TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

3/17/20

(Date)

(Signature of Supervising Senator/Officer)

## EMPLOYEE PRE-TRAVEL AUTHORIZATION

Date/Time Stamp:

**Pre-Travel Filing Instructions:** Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at [ethics.senate.gov](http://ethics.senate.gov). Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Kurt Lynch

Name of Traveler: \_\_\_\_\_

Senator Catherine Cortez Masto

Employing Office/Committee: \_\_\_\_\_

Private Sponsor(s) (list all): Information Technology and Innovation Foundation

Travel date(s): 2/20/20 - 2/22/20

*Note: If you plan to extend the trip for any reason you must notify the Committee.*

Destination(s): San Juan, Puerto Rico

Explain how this trip is specifically connected to the traveler's official or representational duties:

This trip will include panel discussions and working sessions with relevant technology and innovation policy experts and stakeholders. These are relevant to staff's portfolio which includes technology, science and innovation, telecommunications, and economic development. Staff has worked on numerous pieces of legislation which are relevant to issues discussed at this event such as data privacy, artificial intelligence, and 5G and these issues are currently being considered by various Congressional committees.

Name of accompanying family member (if any): \_\_\_\_\_

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

1/17/2020

(Date)



(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

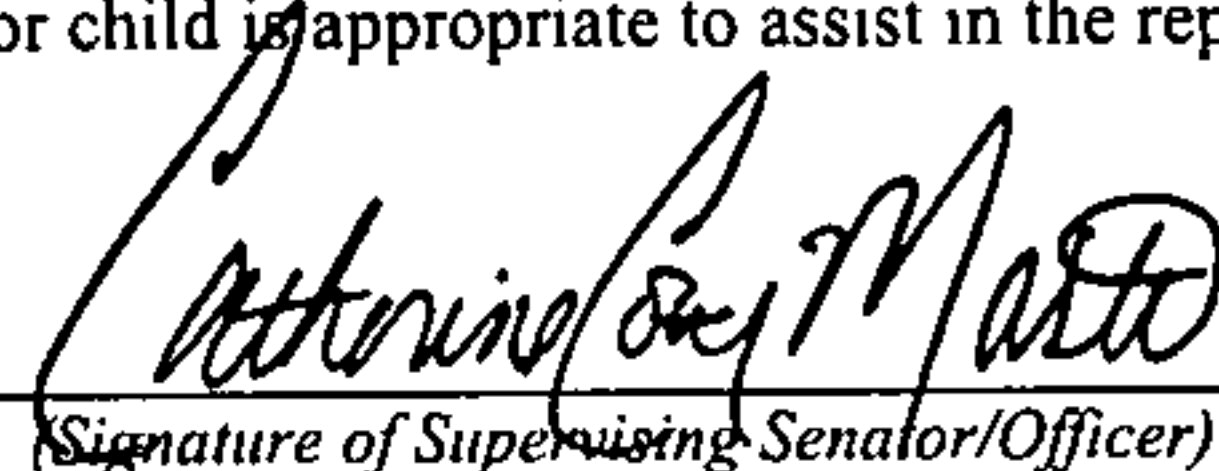
I, Senator Catherine Cortez Masto hereby authorize Kurt Lynch  
(Print Senator's/Officer's Name) (Print Traveler's Name)

☒ an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

☒ I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

1/21/2020

(Date)



(Signature of Supervising Senator/Officer)

## PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): Information Technology and Innovation Foundation (ITIF)
2. Description of the trip: ITIF's Annual Innovation Policy Retreat, an event to assess policy challenges related to technology and competitiveness-related issues and explore solutions to foster economic growth
3. Dates of travel: February 20, 2020 - February 23, 2020
4. Place of travel: San Juan, Puerto Rico
5. Name and title of Senate invitees: See Attachment
6. I *certify* that the trip fits one of the following categories:  
☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.  
- OR -  
☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.  
- AND -  
☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:  
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.  
- AND -  
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).



9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

— OR —

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

— OR —

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

N/A

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

ITIF is the sole sponsor and is organizing all aspects of this trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

ITIF is a 501(c)(3) non-profit organization founded in 2006 whose mission is to formulate and promote public policies to advance technological innovation and productivity. Our fifth policy retreat will facilitate serious discussions about difficult economic and innovation challenges facing our nation.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

We began sponsoring congressional trips in 2010, and since then have hosted close to 400 staffers from the House and Senate. This will be our fifth policy retreat, and our first time traveling to Puerto Rico.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

We are a leading resource for elected officials, their staff and the media, who rely on our ongoing policy reports, forums and debates to ensure that new and creative policy proposals are helping advance innovation.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$980 airfare + \$150 airport shuttles = \$1130	\$275/night = \$825 total	\$200	\$1500 waived registration fee
<input type="checkbox"/> Actual Amounts				

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This conference is arranged without regard to congressional participation.

18. Reason for selecting the location of the event or trip

Puerto Rico is an easy flight from Washington, DC and most locations from which our guests will travel.

We also found their hotels and vendors to be affordable and eager to accommodate our group.

19. Name and location of hotel or other lodging facility:

Caribe Hilton, 1 Calle San Geronimo, San Juan 00901, Puerto Rico

20. Reason(s) for selecting hotel or other lodging facility:

Availability of rooms and event space, pricing, proximity to major airport.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

**Our nightly rate is \$80 more and projected meal cost about \$30 more than the DOD's per diem rate for**

## Puerto Rico in February.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

**Coach class travel on a commercial airline will be provided.**

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

**Signature of Travel Sponsor:**

**Name and Title:** Jackie Whisman, Vice President

Name of Organization: ITIF

**Address:** 700 K Street NW, Suite 600, Washington DC 20001

Telephone Number: (202) 626-5748

**Fax Number:**

E-mail Address: [jwhisman@itif.org](mailto:jwhisman@itif.org)

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## Lynch, Kurt (Cortez Masto)

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**From:** Jackie Whisman <jwhisman@itif.org>  
**Sent:** Monday, January 13, 2020 3:10 PM  
**To:** Lynch, Kurt (Cortez Masto)  
**Subject:** Invitation: ITIF's Innovation Policy Retreat in San Juan Feb 20 - 22  
**Attachments:** ITIF Innovation Policy Retreat 2020 DRAFT AGENDA.pdf; ITIF Retreat Flight Form San Juan 2020.xlsx

Kurt:

On behalf of the Information Technology and Innovation Foundation (ITIF), I would like to invite you to join us for ITIF's invitation-only Innovation Policy Retreat in San Juan, Puerto Rico Thursday February 20 through Saturday, February 22, 2020 and participate in our closing panel featuring other Congressional staff on Saturday evening, February 22. I have included a draft agenda for reference.

ITIF is the world's top-ranked think tank for science and technology policy. Our expertise runs the gamut from Internet-related topics such as data privacy and cybersecurity, to telecom issues such as broadband deployment, to broader issues related to public and private research and development, trade, and other factors affecting innovation, productivity, and competitiveness across the U.S. and global economies.

As in past years, this retreat will bring together leaders from business, government, and academia to assess policy challenges on technology and competitiveness-related issues and explore evidence-based solutions to foster economic growth and societal progress. We anticipate around 90 total attendees, and all discussions are off-the-record and closed to the press.

ITIF is happy to cover the costs of your travel, group meals and hotel stay, and the events during the retreat will adhere to House and Senate Ethics Committee guidelines for privately sponsored travel.

To RSVP, please reply to this email with a completed version of the attached flight form so we can add your information to our flight block with United. If you are interested but not able to commit just yet, please let me know, and I'm happy to answer any questions as you consider the invitation. The deadline to RSVP is Friday, January 17, 2020.

We very much appreciate your consideration and hope you can join us in February!

Jackie Whisman  
Vice President, Development and Outreach | Information Technology and Innovation Foundation  
O: 202-626-5748 | M: 240-687-1834 | [jwhisman@itif.org](mailto:jwhisman@itif.org) | [@itifdc](https://twitter.com/itifdc)



## ITIF'S FIFTH ANNUAL INNOVATION POLICY RETREAT

### Attachment: Senate Staff Invitees

Erica	Andeweg	Legislative Assistant	U.S. Senator Deb Fischer
Rachel	Appelton	Counsel	U.S. Senate Judiciary Committee
Tristan	Brown	Legislative Counsel	U.S. Senator Gary Peters
Alexandrine	De Bianchi	Senior Legislative Assistant	U.S. Senator Jacky Rosen
Mike	Flynn	Senior Counsel	Senate Homeland Security and Governmental Affairs Committee
Adam	Hechavarria	Legislative Director	U.S. Senator Todd Young
April	Jones	Counsel	U.S. Senator Amy Klobuchar
Joel	Kelsey	Chief of Staff	U.S. Senator Blumenthal
Chris	Leuchten	Counsel/Policy Advisor	U.S. Senator Kyrsten Sinema
John	Lin	Professional Staff Member	Senate Commerce, Science and Transportation Committee
Sam	Love	Legislative Assistant	Senator Cory Gardner
Kurt	Lynch	Legislative Aide	Senator Catherine Cortez Masto
Sam	Mulopulos	Legislative Assistant	U.S. Senator Rob Portman
Stephen	Newton	Legislative Assistant	U.S. Senator Mitt Romney
Caleb	Orr	Projects Director	U.S. Senate Small Business Committee/Senator Rubio
David	Pendle	Chief Counsel, Criminal Justice	U.S. Senate Judiciary Committee
Sydney	Pettit	Legislative Assistant	Senator Shelley Moore Capito
Anant	Raut	Counsel	U.S. Senate Judiciary Committee
Scott	Reber	Legislative Assistant	Senator James Risch
George	Redden	Legislative Aide	Senator Jerry Moran
Jacob	Reses	Senior Policy Adviser	U.S. Senator Josh Hawley
Dominic	Saavedra	Legislative Assistant	Senator Heinrich
Troy D.	Stock	Policy Counsel	U.S. Senate Republican Policy Committee
Mimi	Strobel	Legislative Assistant	U.S. Senator Ron Johnson
Dan	Swanson	Senior Counsel	U.S. Senate Judiciary Committee
Eric	Teetsel	Legislative Director	Senator Josh Hawley
Olivia	Trusty	Subcommittee Policy Director	Senate Commerce, Science and Transportation Committee
Jay	Weismuller	Policy Adviser	U.S. Senator Maggie Hassan
Carolina	Young	Policy Adviser	U.S. Senator Mark Warner



## ITIF'S FIFTH ANNUAL INNOVATION POLICY RETREAT

February 20 – 22, 2020 | Caribe Hilton | San Juan, Puerto Rico

### Thursday, February 20, 2020

- 8:15 AM** United Airlines Flight 2021 Departs Dulles International Airport (IAD)
- 1:01 PM** United Airlines Flight 2021 Arrives San Juan International Airport (SJU)
- 1:30 – 2:15 PM** Travel Time from SJU (boxed lunch provided)
- 2:30 – 4:30 PM** **“Rebuilding Puerto Rico” Service Event with University of Puerto Rico Mentors and High School Student Innovators from Bayamón, Puerto Rico**  
*ITIF has organized a monthlong collaboration between University of Puerto Rico technologists and high school students from five public schools in during which the high school innovators will identify a public challenge and use technology to solve it. Many of the projects will be related to rebuilding the island's technology infrastructure. The students and their University mentors will present their work and findings to our group and accept feedback from attendees.*  
Program Timing: Introductions by Rob Atkinson, ITIF (10 min); Student Presentations (15 min each/75 min total); Q&A (35 min)
- 5:30 – 7:00 PM** Welcome Reception
- 7:00 – 8:30 PM** **Dinner Discussion: IT-Based Automation**  
Confirmed: Jerry Hultin, Global Futures Group; David Moschella, Leading Edge Forum  
Program Timing: Dinner Buffet (30 min); Moderated Fireside Chat (30 min); “Innovation Trivia” Icebreaker (30 min)  
*The next wave of information technology--internet of things, 5G, autonomous systems, and artificial intelligence--offer the potential to accelerate productivity growth from its current anemic rates. This presentation will explore the opportunities and challenges for using IT to drive productivity in large enterprises, including government and business, and what the policy issues are for government.*

Friday, February 21, 2020

*Theme: Innovation and Competitiveness*

**8:00 – 8:30 AM**      **Breakfast**

**8:30 – 9:00 AM**      **Welcome Remarks: Congressman Darren Soto (FL-09)**  
*The Congressman will deliver remarks on what the federal government can, is, and should do to aid in the recovery of Puerto Rico's infrastructure and economic stability.*

**9:15 – 10:15 AM**      **Breakout Sessions**

- Genomics, Data and the Future of Drug Innovation  
(Moderated by Stephen Ezell, ITIF)
- IoT and Smart Cities: Achieving the Promise  
(Moderated by Daniel Castro, ITIF)
- Techlash: What to Do  
(Moderated by Rob Atkinson, ITIF)
- The Rural Broadband Dilemma: Challenges and Solutions  
(Moderated by Doug Brake, ITIF)

**10:30 – 11:45 AM**      **Panel: China: The Long Cold War?**  
Moderator: Rob Atkinson, Founder and President, ITIF  
Confirmed: Jim McGregor, APCO Worldwide; John Neuffer, Semiconductor Industry Association; Clete Willems, Akin Gump  
*U.S. foreign and trade policy has clearly changed vis-à-vis China in the last few years. Many argue that it will be impossible to go back to the pre-2017 relationship regardless of who is in the White House in 2021. If so, what will this new relationship between China and the West look like and what are the implications for U.S. companies and the U.S. trade policy?*

**11:45 – 12:30 PM**      **Lunch + Fireside Chat with Ian Conner, FTC's Bureau of Competition**  
Program Timing: Lunch Buffet (15 minutes) Discussion (30 minutes)  
*The rise of the digital economy, including a wide array of internet platforms are raising new questions regarding antitrust policy. At the same time, there have been calls to increase overall stringency of antitrust, in both merger review and conduct enforcement. This conversation will review these issues, particularly in terms of how the FTC is viewing them.*

**12:45 – 2:00 PM**      **Panel: Time for a New American Innovation and Competitiveness Policy?**  
Moderator: Rob Atkinson, Founder and President, ITIF  
Confirmed: Julius Krein, *American Affairs Journal*; Caleb Orr, U.S. Senate Small Business Committee (Majority)  
*For almost three decades, the consensus on both the left and the right was that there was not only no need for an articulated national innovation and competitiveness policy, but that such a policy might in fact be harmful. Those views appear to have shifted significantly. Several Democratic presidential candidates have called for such a policy; a growing raft of "national interest" conservatives have rejected free market doctrines to embrace an active innovation and competitiveness policy. What does this mean for policy development? Are such proposals likely to make it through the policy gauntlet that is Washington? Will the "bad" come with the "good?" How should the innovation policy community attempt to shape these policy proposals?*

## Lunch



*Increasingly, nations are grappling with Internet policy questions that affect other nations, whether it involves taxation of digital companies, copyright and digital content, cross border data flows, election security, antitrust, privacy and the “right to be forgotten.” For many issues international frameworks and coordination are needed. For others, we need the opposite: national frameworks that govern internet activity only in that nation. How should policy makers tell the difference? What should U.S. policy makers do to ensure a robust global Internet policy framework.*

*There is a renewed debate about whether Internet platforms deserve to be shielded from liability for the content posted by their users. A number of policymakers have called for platforms to be treated more like publishers. This idea has particularly gained traction among those who reject the neutrality of these platforms or who do not think these companies are doing enough to protect users. Yet even as many experts defend the status quo, noting that making changes to the long-standing protections that have allowed the digital economy to flourish is highly risky, there is growing momentum to negotiate a new deal. Should policymakers revise Section 230 or draw a hard line? And how will potential changes to liability protections abroad impact the available options?*

## Reception

*Congressional staff will participate in a moderated discussion that briefly summarizes the main retreat themes and takeaways, then moves to an active discussion of related legislation on the horizon for the 116<sup>th</sup> Congress.*

Sunday, February 23, 2020

## Southwest Flight 5227 Departs SJU

## Southwest Flight 5227 Lands BWI